Market evolution: Pork (CN 0203) — 2015–2025

Introduction

Over the 2015–2025 period, EU external trade in fresh, chilled and frozen pork (CN 0203) experienced a remarkable cycle of boom, contraction and realignment. The most visible feature was the sharp surge in export values to an all-time high in 2020, driven almost entirely by a temporary explosion of Chinese demand, followed by a rapid normalisation. Beneath this headline, the EU pork sector strengthened its net-export position, raised unit prices substantially, and saw a major shift in both export destinations and the relative standing of member state exporters. While export volume ended slightly below the 2015 level, value and trade balance posted solid gains thanks to pervasive price inflation across all product categories. This report describes and interprets these dynamics across three main themes, drawing exclusively on the official trade figures provided.

1. The China shock and the diversification of EU pork exports

The single most powerful force in the decade's pork trade was the tumultuous relationship with China. EU pork exports became heavily exposed to Chinese swine disease outbreaks, which triggered a price and volume shock that subsequently unwound, forcing a broad-based diversification.

China's import demand exploded in 2019–2020 and then collapsed almost as fast

Between 2015 and 2025, total EU pork exports to non-EU markets rose from € 4.97 billion to € 6.04 billion (General Overview). However, that final figure masks a dramatic intermediate peak: in 2020, exports hit € 10.07 billion, the highest value ever recorded. This spike was overwhelmingly attributable to China. As shown in Table 1, EU exports to China rocketed from € 899 million in 2015 to € 5.72 billion in 2020 before receding back to € 899 million in 2025 (top partners). The quantity data confirm the story: volumes shipped to China surged from 504 thousand tonnes in 2015 to 2.29 million tonnes in 2020, then fell back to 434 thousand tonnes in 2025 (exports quantity series). The shock was so pronounced that a statistical price-shock event was identified with a 44.6 % price shift centred on 2019 (abnormality 4.8, value share 37.1 %) (shock events).

The post-China reorientation favoured rising Asian and Oceania markets

While Chinese purchases collapsed, other destinations absorbed more EU pork. The Republic of Korea increased its purchases from € 475 million to € 835 million (+75.8 %), the Philippines from € 95 million to € 297 million (+212.8 %), and Australia from € 225 million to € 292 million (+29.4 %). Even Japan, the third-largest market, stayed near € 1 billion throughout, despite a slight decline. The United Kingdom, though still the second-largest partner, saw a moderate drop of 8.5 %. These shifts reduced the concentration of EU exports: the Herfindahl-Hirschman Index (HHI) for export value fell from 1 381 in 2015 to 1 053 in 2025 (concentration), indicating a healthier, more balanced customer portfolio.

Table 1 – Top EU pork export destinations: value comparison (EUR million)

Partner	2015	2025	Change (%)
China	899	899	–0.0
United Kingdom	1 091	998	–8.5
Japan	1 003	974	–2.9
Korea, Republic of	475	835	+75.8
Philippines	95	297	+212.8
Australia	225	292	+29.4
Hong Kong	135	90	–33.7
Others	1 042	1 657	+59.0
Total	**4 967**	**6 041**	**+21.6**

Source: EU extra-EU pork exports – partner detail.

2. A reshuffled league of EU exporters: the rise of Spain and the inversion of the German powerhouse

The decade not only recast export destinations but thoroughly reshuffled the internal map of EU pork suppliers. Spain overtook all other member states to become the undisputed export champion, while Germany's position collapsed.

Spain cemented its role as the EU's leading pork export force

Between 2015 and 2025, Spain's extra-EU pork export value soared from € 872 million to € 2 356 million, a gain of 170.2 %, while its share of total EU exports more than doubled (top reporters). The realised comparative advantage (RCA) index of 4.43 and a specialisation score (RSCA) of 0.63 in 2025 underline a deep structural specialisation in pork (specialisation). Denmark held on as the second-largest exporter, with a very high RCA of 6.16 and RSCA of 0.72, though its absolute value shrank by 10.0 % to € 1.11 billion.

Germany’s export volume dissolved, partly replaced by the Netherlands and others

Germany’s export value tumbled from € 904 million to € 386 million, a 57.3 % decline. The fall coincided with the domestic appearance of African swine fever (ASF) and the subsequent closure of key non-EU markets to German pork. The Netherlands (+38.6 % to € 807 million), Poland (+38.3 % to € 220 million), and France (+23.5 % to € 363 million) partially filled the gap. The overall export HHI among member states (value) decreased from 1 381 to 1 053, reflecting a less concentrated supply base (concentration).

Table 2 – Top EU member state exporters of pork to non-EU markets (EUR million)

Reporter	2015	2025	Change (%)
Spain	872	2 356	+170.2
Denmark	1 233	1 110	–10.0
Germany	904	386	–57.3
Netherlands	582	807	+38.6
France	294	363	+23.5
Ireland	301	298	–0.7
Poland	159	220	+38.3
Others	621	501	–19.3
Total	**4 967**	**6 041**	**+21.6**

Source: EU extra-EU pork exports – reporter detail.

3. Price-led trade growth and the strengthening of the EU’s net-exporter role

While the volume of EU pork exports ended the period slightly below where it began, the value of trade grew resolutely, propelled by a broad increase in unit prices. At the same time, the EU’s reliance on imports continued to shrink and the share of production sold abroad edged higher, reinforcing the sector’s structural resilience.

Export value grew by more than a fifth even though shipped tonnage fell

The overall export quantity moved from 2.16 million tonnes in 2015 to 2.03 million tonnes in 2025, a decline of 6.1 %. In contrast, the average export price jumped from € 2 295 per tonne to € 2 972 per tonne (+29.5 %), lifting export value to € 6.04 billion (trade overview).

Similar price inflation occurred in imports (€ 2 312 to € 2 845 per tonne, +23.1 %), but import quantities fell even more sharply (–28.8 %), from 94 k to 67 k tonnes. The result was a trade balance that grew from € 4.75 billion to € 5.85 billion, a robust increase of 23.2 %.

The EU’s net-export position deepened amid rising export propensity

The EU’s net import reliance (extra-EU imports minus exports, relative to production) fell from –13.8 % in 2015 to –11.8 % in 2024, reaching a temporary low of –25.2 % in the peak China-export year of 2020 (net import reliance). This means the EU remains a structural net exporter, sending far more pork abroad than it brings in. Export propensity (exports as a share of production) rose from 12.7 % in 2015 to a peak of 20.7 % in 2020, before settling at 10.9 % in 2024, still above the 2015 level (export propensity). Total EU production quantity remained virtually stable (from 22.3 million tonnes in 2015 to 22.0 million tonnes in 2024), yet the production value more than doubled from € 39 billion to € 57 billion (production volumes), confirming the price-driven nature of the value expansion.

Frozen pork cuts dominate the export mix and drove price trends

The export basket is overwhelmingly made up of frozen meat. Frozen meat of swine (mainly excluding carcases and hams, CN 020329) accounted for between 1.47 million and 1.48 million tonnes in 2015 and 2025, respectively, peaking at 2.62 million tonnes in 2020. Its unit price rose from € 2 327/t to € 3 116/t (+33.9 %). Frozen hams and shoulders (CN 020322) also saw a significant price increase (from € 1 713/t to € 1 713/t, but with strong interim variation). Fresh/chilled cuts (CN 020319) exhibited an even steeper price uplift, from € 2 672/t to € 3 328/t (+24.6 %) (product segment breakdown). The data underline that the entire product range experienced sustained price inflation, which more than compensated for stagnating or slightly declining volumes.

Conclusion

The EU pork sector’s external trade over 2015–2025 was defined by an extraordinary China-fuelled boom and subsequent rebalancing. The abrupt collapse of Chinese imports after 2020 forced a rapid diversification towards Korea, the Philippines, and other partners, reducing the concentration of export risk. Internally, Spain became the pre-eminent EU exporter, while Germany’s role shrank dramatically. Despite a net fall in shipped tonnage, export value and the trade surplus grew solidly thanks to a broad price upswing that touched every product category. The EU’s net-export position deepened, and the share of production directed to third countries, though down from the 2020 high, remained above the decade’s start. The sector now appears more geographically balanced and structurally reliant on high-value frozen cuts, yet it remains sensitive to animal disease shocks and geopolitical access to large Asian markets.

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